From:	Stephen Newchok
To:	Tucker-Potter, Stacy; Pryor, Corie
Cc:	Rellen Hayes
Subject:	RE: Truman St Univ - File Received, Data Questions
Date:	Monday, August 19, 2019 10:38:25 AM
Attachments:	PCI Occupation Codes.xlsx DataDocs_DueBacktoPCI.doc

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Stacy:

Hello! Thank you for your answers and for speaking with me today.

As per our call:

- We'd like the Occupation list by the end of this week, the other lists can be sent later (if we are using the fields). It takes a few days for our programmers to add the data to the PCI system, so we don't need it today. Occupation is the most important out of the others.

- We'd like the Data Docs completed, as that will tell all departments counts and any special instructions. I've re-attached them in this email also.

- Two questions contained in this Data Docs that I had specific questions about:

    - Please let us know if we are using your Occupation list, or converting the data to the PCI Occupation list (attached). Corie will be working on that later, she has several projects going on now.

    - Do we have lost alumni? Answer: Yes. Some Banner files from others had a field LOST, but you have indicated that is not a field in use. Blank address = lost.

- My preliminary lost record count is around 5,000 records (and almost 11,000 deceased).

Thank you for your help!

Regards,
Stephen

Stephen Newchok
Publishing Concepts | Data Acquisition Leader
Proud PCI Associate since 1996

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Back-to-Back Winner! For two years in a row PCI has been named the "#1 Best Place to Work" in the state of Texas (The Texas Association of Business and the publishers of *Texas Monthly*) and in Dallas-Fort Worth (*Dallas Morning News*). Research shows that a highly engaged workforce drives higher overall client satisfaction.

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From: Tucker-Potter, Stacy <stuckerpotter@truman.edu>
Sent: Monday, August 19, 2019 9:03 AM
To: Stephen Newchok <SNewchok@publishingconcepts.com>; Pryor, Corie <cpryor@truman.edu>
Cc: Rellen Hayes <rhayes@publishingconcepts.com>
Subject: RE: Truman St Univ - File Received, Data Questions

Answers below in red:

Stacy Tucker-Potter ('02)
Director of Engagement
(660) 785-7432

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From: Stephen Newchok [mailto:SNewchok@publishingconcepts.com]
Sent: Friday, August 16, 2019 5:08 PM
To: Pryor, Corie; Tucker-Potter, Stacy
Cc: Rellen Hayes
Subject: Truman St Univ - File Received, Data Questions

Corrie:

Hello! Thank you for sending the file awre061_071819.xlsx = 74,284 records.

A few quick questions from spot checking it:

Items we need to continue:

1. Can you let us know what the DONR1-DONR4 codes mean in regards to this project? (We are looking for records to mark as No Mail, No Email, No Phone, Don't Include in the Project) these are our donor categories. The file you have should all be ALUM. There are additional categories for FAST (faculty staff), PRNT/PARC (Parent coding), ATHL (athlete), etc. This should affect you as the main category is all alumni.
2. Can you let us know what the EXCL1-EXCL4 codes mean in regards to this project? (No Mail, No Email, No Phone, Don't Include in the Project) EXCL are our exclusion code. NML is no mail. NEM is no email. NPC is no phone call. We decided that these people should still receive the communications from you for a couple of reasons. But mainly our thought was that individuals who have elected not to receive calls or mail from the university should be

given an opportunity to opt out of the directory. If we exclude them from this project, we will not be giving them the chance to select out. We are creating a directory exclusion to treat those who opt out moving forward, but as we have not done a directory in quite some time, none of the individuals you have in your file would be marked that way.

3. Are there any other indicators for No Mail, No Email, No Phone, and Don't Include in the Project? Se answer above.
4. Is it correct that Exp Date = "x" or is blank? If so, what does that indicate? Anyone with the x in EXP date column is a current alumni chapter member.
5. Is it correct that 2019 Tot Gift = "x" or is blank? If so, what does that indicate? Anyone with an x in the 2019 tot gift has made a gift in FY19.

Not as urgent: What is the timeline you want on these? I will discuss further with Corie.

6. Can you send us dropdowns for JOBC (I assume this to be the Occupation Code)?
7. Can you send us dropdowns for Degree (BA = Bachelor of Arts, etc.) We don't allow updates but we use this to edit/validate values such as clearing "Unknown"
8. Can you send us dropdowns for Degr Majr/Majors, if being used in the project?
9. Can you send us dropdowns for Pref Coll, if being used in the project?

Our team may have a few additional questions next week, but I wanted to send this while I had it open. Thank you again for all your help and pulling double duty!

Regards,
Stephen

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From: Pryor, Corie <cpryor@truman.edu>
Sent: Friday, August 16, 2019 5:28 PM
To: Tucker-Potter, Stacy <stuckerpotter@truman.edu>; Stephen Newchok <SNewchok@publishingconcepts.com>
Subject: RE: Truman St Univ - Data/Materials

I believe it has been uploaded. Let me know if you have not received it.

Corie

Corie Pryor
Coordinator of Advancement Services
Advancement Office
Truman State University
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660-785-4125

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From: Tucker-Potter, Stacy
Sent: Friday, August 16, 2019 9:21 AM
To: Stephen Newchok <SNewchok@publishingconcepts.com>
Cc: Pryor, Corie <cpryor@truman.edu>
Subject: RE: Truman St Univ - Data/Materials

Hi Stephen,

I got your voicemail as well. Thanks for checking in. Corie, cc-ed here, is hoping to work on the file upload this afternoon. She's pulling double duty today and covering for one of her direct reports. But she's on the job and knows to check in if she has problems. Thanks again!

Stacy

Stacy Tucker-Potter ('02)
Director of Engagement
(660) 785-7432

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From: Stephen Newchok [mailto:SNewchok@publishingconcepts.com]
Sent: Thursday, August 15, 2019 4:08 PM
To: Tucker-Potter, Stacy
Cc: Rellen Hayes

Subject: Truman St Univ - Data/Materials

Stacy:

Hello! I wanted to check in and see how things were coming along, and if there were any questions. I believe Rellen told me you were back today, so I understand if you're digging out.

Regards,
Stephen

Stephen Newchok
Publishing Concepts | Data Acquisition Leader
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